

GUIDELINES FOR IMPORTING CLIENT DATA INTO PORTUS

CSV FILE FORMAT

#	Field Name	Data Type	Length	Required	Description
1	Title	Character		Optional	Must be one of: <div><div><ul style="list-style-type: none">• Dr• Mrs• Mr• Ms</div><div><ul style="list-style-type: none">• Rev• Fr• Sr / Sir• Prf</div></div>
2	First Name	Character	30	Mandatory	
3	Last Name	Character	30	Mandatory	
4	Sex	Character		Mandatory	Must be one of: <div><div><ul style="list-style-type: none">• M• F</div><div>Alternatively:<ul style="list-style-type: none">• Male• Female</div></div>
5	Date of Birth	DD/MM/YYYY		Mandatory	
6	Relationship Status	Character		Optional	Must be one of: <div><div><ul style="list-style-type: none">• Married• Civil Partnership• Divorced</div><div><ul style="list-style-type: none">• Separated• Single• Widowed</div></div>
7	Address 1	Character	30	Mandatory	
8	Address 2	Character	30	Optional	
9	Address 3	Character	30	Optional	
10	Address 4	Character	30	Optional	
11	Email Address	Character	30	Optional*	Must be a valid email address.
12	Home Phone	Character	20	Optional	
13	Mobile Phone	Character	20	Optional**	
14	Seller Agency Code	Character	20	Mandatory	

NOTES:

1.

Although this facility has not pre-determined capacity limit, we recommend you process your clients in batches no bigger than 2000 per time.
2.

If a field value is longer than the length allowed then it will be truncated to the maximum length.
3.

* - The email address is optional, but the client cannot opt for a paperless service until it is provided
4.

** - The mobile phone number is optional, but the client cannot opt for a paperless service until it is provided.
5.

If you experience any problems preparing data or running the import please contact Donal.Wood@IrishLife.ie or John.Dolan@IrishLife.ie

EXAMPLE CSV FILE

Here’s an example of a CSV file with the header line and two client entries:

Title,First Name,Last Name,Sex,Date of Birth,Relationship status,Address 1,Address 2,Address 3,Address 4,Email Address,Home Phone,Mobile Phone,Seller Agency code

,John,Smith,M,25/01/1970,Married,1 Main Street,Ballyburty,,,jsmith@ballyburty.com,098 1112222,0821112233,AJ123

Ms,Mary,O’ Moore,F,13/11/1960,Married,2 Main Street,BallySomewhere,Balbriggan,Co Dublin,momoore@example.com,021 111222,081 4445566,AJ123